NEW AGENT CHECKLIST

Agent: _____ Manager: _____

7-Step Training | Check each box as you complete it. *Start date:* _____

Step 1 - Welcome & Get Connected

- ☐ Print New Agent Checklist
- ☐ Review Upcoming Training Events Page
- ☐ Subscribe to the Theodore Group Email List (Confirm your subscription; OPT IN email from Cindi Theodore, check SPAM)
- ☐ Sign up for Group me here (click the link on your phone and download the GroupMe app)
- ☐ Training Calls and Virtual Office: add the trainings to your calendar with reminders Bookmark Training Calls Page

Step 2 - Contracting & Compliance

- ☐ Tips for filling out the Contracting DocuSign (find your EF number in welcome email from Equis)
- ☐ Gather Documents for your contracting profile:
  - ☐ Copy of your insurance license
  - ☐ Copy of your driver's license
  - ☐ Voided check (#101 or higher), bank letter or direct deposit form
- ☐ REG-ED Anti-Money Laundering Course(AML) certificate (REQUIRED - NO EXCEPTIONS)
- ☐ Errors & Omissions Insurance (E&O): $1M per claim / $2M aggregate,
- ☐ Explanation letter for any "yes" answers (typed; if applicable)
- ☐ Text Manager when packet is complete so onboarding can process
- ☐ Complete the SureLC/SuranceBay carrier contracting emails
- ☐ Print the Carrier Contracting Checklist & text it to your manager

Step 3 - Understand the Business

- ☐ Watch What is Mortgage Protection?
- ☐ Watch Expectations for Success
- ☐ Download and/or Print Product Tables (Term & IUL, Whole Life)
- ☐ Edit the living benefits grid with your information (top right corner), save as a pdf to your computer and/or print the grid
- ☐ Watch product training with Matt Weiner

Step 4 - Set Up Your Toolkit

- ☐ Set up your agent portal with each carrier (after receiving welcome email)
- ☐ Bookmark the Carrier Info Tab; practice running quotes with carriers
- ☐ Download Value of Mortgage Protection, carrier logos, and needs analysis (print 10 copies of the needs analysis worksheet in color)
- ☐ Set up HiHello (free digital business card)
- ☐ Set Up Whereby Account (free video conferencing)
- ☐ Activity Tracker & Organization Tools (invest in an appointment planner)
- ☐ Review Profitability Calculator: use it with your manager to identify the metrics for your goal

Step 5 - Leads & Setting Appointments

- ☐ Create your IntegrityCONNECT Account and review the training on Equis site (text your manager for the Referral Code)
- ☐ Watch How to use IntegrityCONNECT step by step with Stephen Butler
- ☐ Watch the tutorial on formatting and importing leads with Stephen Butler
- ☐ Review what a Lead Looks Like: Mortgage Protection - Mail Back and IVR
- ☐ Create Mailco Account ASAP for more leads (agency name: "Theodore Group") Game plan with your Manager before purchasing leads
- ☐ Download and/or Print Phone Script & Overcoming Objections
- ☐ Print Dial Tracker (send to your manager after each dial session)
- ☐ Review Triple Dialing & Dialing Tips
- ☐ Watch Matt Gibbons Dial & Overcome Objections
- ☐ Register Your Phone Number for Spam Monitoring

Step 6 - Run the Appointment

- ☐ Watch how to complete the Needs Analysis
- ☐ Practice Needs Analysis: fill it out as a client and text it to your manager
- ☐ Download and/or Print the Virtual Appointment Outline
- ☐ Watch Matt Weiner go over the simple five step process top producers execute
- ☐ Watch Matt Gibbons present Equity Protection and full mortgage pay off options in a virtual appointment
- ☐ Watch Jon Schwartz show how to report and manage applications

Step 7 - Next Level

- ☐ Review Promotional Guidelines to learn how to earn a contract increase & how to win the Ignite Award
- ☐ Review Profitability Calculator from step 4 again (Set your contract level to 80% for most agents, Average policy premium to $1200, Show rate 65%, Close rate 40% and placement rate 65% and you determine the appointments booked weekly)
- ☐ Review your Regional Manager Team Lead Bonus
- ☐ Review how to become a builder?
- ☐ Text your manager to set up a call to go over your goals